

**National Strategy & Action Plan
to further develop the
Jamaican Music Industry**

**Prepared for
The Ministry of Education Youth & Culture
and the**

**Global Alliance Programme
UNESCO**

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Abbreviations

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| CPTC | The Creative Production and Training Centre |
| CHASE Fund | Culture, Health, Arts, Sports and Education Fund |
| DBJ | Development Bank of Jamaica |
| EEA | Entertainment Encouragement Act |
| EXED | Excelsior Community College |
| HEART-NTA | Human Employment and Resource Training Trust – National Training Agency |
| JACAP | Jamaica Association of Composers, Authors and Publishers |
| JCDC | Jamaica Cultural Development Commission |
| JIS | Jamaica Information Service |
| JIPO | Jamaica Intellectual Property Office |
| JAMPRO | Jamaica Promotions |
| JTB | Jamaica Tourist Board |
| MOEYC | Ministry of Education, Youth and Culture |
| NIBJ | National Development Bank of Jamaica |
| PIOJ | Planning Institute of Jamaica |
| SDC | Social Development Commission |
| STATIN | Statistical Institute of Jamaica |
| UTECH | University of Technology |
| UWI | University of the West Indies |
| VTDI | The Vocational Training and Development Institute |

Executive Summary

The Ministry of Education, Youth and Culture in collaboration with the Global Alliance Programme, UNESCO and the Inter-Agency Cultural Committee, commissioned the preparation of a National Strategy and Action Plan to develop the Jamaican music industry. This initiative sought to build on the many studies that have been done on the industry over the past decade, and to identify strategies, actions and partnerships that would help to realize greater economic gains from one of Jamaica's most recognized and promising exports.

All the major studies on the music industry were reviewed by the Consultant before initiating consultations with persons in the industry, in the public and the private sectors, between December 2003 and September 2004. The participants reaffirmed many of the main recommendations in the studies, and identified 15 strategies that should be implemented through partnerships with government, private and international organisations. These were further summarized in the following seven strategies:

1. Create an enabling environment for the development of the industry by way of incentives, relevant policies, data collection, legislation and enforcement, promoting intersectoral linkages (eg. tourism and information technology) and by developing stronger institutions in the music industry and the government to serve the industry.
2. Increase market share for the Jamaican music industry through a better structured, targeted and effective system of marketing and promotion.
3. Increase the profitability of the music industry by strengthening collecting societies and by stepping up anti-piracy efforts and measures.
4. Improve the Jamaican music product and ensure continued standards of professionalism in service and product delivery, by creating mechanisms to identify and develop new talent, and by providing on-going training opportunities for industry persons; by continued market research and the development of new and innovative music products and services.
5. Increase the level and diversify the range of financing opportunities available to the music industry, including venture capital, grants and loans from government, private and international sources.
6. Create stakeholder buy-in through public education to combat piracy and change negative attitudes; celebrate and commemorate industry achievements and heroes.
7. Coordinate and strengthen training institutions and increase training opportunities in music education and professional development.

An **Action Plan** is also proposed, which details the specific actions required on the part of each partner to realize the desired outcomes. Recognising that all the proposals in the Action Plan cannot be addressed at once, a recommendation for the immediate implementation of 7 strategic actions as catalysts for development of the sector, concludes the document:

1. The government should establish a dedicated organization with an overseas marketing office, with significant resources to support the music and entertainment industries. This will ensure that there are human and financial resources available to address many of the issues, obstacles and needs raised in this National Strategy.
2. Until such a body can be established, the Inter-Agency Cultural Committee should make presentations and convene a series of training and sensitization workshops for persons in the public and private sectors that impact on the industry. These include the Statistical Institute of Jamaica, the Planning Institute of Jamaica, and the development banks; other public sector officials in trade, tourism, sports, customs, information technology and the legislative arm of government; and selected private sector leaders.
3. A capacity building programme proposal should be developed and funding sought to assist industry associations, collecting societies and the data collection arm of the government. The proposal should be developed by the Entertainment Unit, in collaboration with industry stakeholders, the Division of Culture, JAMPRO, JIPO, STATIN and PIOJ.
4. Educational and cultural institutions should meet and develop a detailed plan of action to review and revise music education programmes at the primary, secondary and tertiary levels, and to advocate for more rigorous implementation of existing music education programmes.
5. The Entertainment Unit should convene a series of meetings with the government's financial and planning institutions (Ministry of Finance, National Investment Bank of Jamaica, Development Bank of Jamaica and the Planning Institute of Jamaica) and with interested private financial institutions such as Pan Caribbean Financial Services, to develop a public-private financial mechanism to assist the industry.
6. The Entertainment Unit, the Division of Culture and JAMPRO should collaborate to ensure that the passage of the Entertainment Encouragement Act is given priority attention by the Government and to address other issues related to legislation and enforcement including piracy, e-commerce, access to appropriate technology and content quotas.
7. The Entertainment Unit in collaboration with the Ministry of Finance and the PIOJ should seek funding for a major venue development programme, to be designed and implemented with input from stakeholders.

National Strategy & Action Plan to further develop the Jamaican Music Industry

Introduction

This document sets out the strategies and actions to be implemented by the Jamaican government, persons active in the music industry, private sector and international partners, to further develop the Jamaican music industry. The preparation of this National Strategy was funded by the Global Alliance Programme administered by UNESCO and implemented by the Culture Division, Ministry of Education, Youth and Culture, Jamaica, in collaboration with the Inter-Agency Cultural Committee.

Several studies and analyses have been done on the Jamaican music industry over the past decade that have very effectively highlighted the challenges faced in developing this industry, and made many useful recommendations for the future. These studies served as the point of departure for the preparation of this National Strategy, as all the major studies on the industry listed at Appendix 1 were reviewed prior to initiating stakeholder consultations (Bourne & Allgrove, 1997; Davis, 1996; Foga & Montague, 2000; Hamilton, 2001; Hamilton, Brown & Stephens, 2002; James, 2001; Kozul-Wright & Stanbury, 2001; Nurse, 2001; Towards Jamaica the Cultural Superstate: The National Cultural Policy of Jamaica, 2003; Watson, 1995; Witter, 2002; Witter, 2003).

In addition to the many studies that have been done on the music industry, several externally funded projects have been implemented over the past seven years. The lessons learned and best practices arising from these initiatives have also informed the development of this National Strategy. These projects include the following:

1. A UNDP funded CARICOM-Caribbean Music Industry Development (CARMID) study, 1998-2000.
2. A European Union funded CARIFORUM Cultural Centres Programme in Jamaica, Trinidad & Tobago, Dominican Republic and Barbados, 1998-2002.
3. UNDP/ILO funded studies on the export potential of Caribbean cultural industries in Grenada, Jamaica & Suriname, 2001-2002.
4. A Caribbean Export Development Agency funded study on the Caribbean music industry in Jamaica, Trinidad & Tobago, Dominican Republic and Barbados, 2001.
5. An IADB funded study on the festival tourism (music festivals) in Jamaica, Barbados, Trinidad & Tobago, St. Kitts & Nevis and St. Lucia, 2001.

6. A UNESCO funded regional meeting on developing cultural industries (Dominica, April 2002).
7. WIPO assistance in establishing Caribbean Copyright Link in Trinidad & Tobago.

This National Strategy is not intended to rehash all the previous studies, but instead seeks to identify some concrete actions arising from the studies, projects and consultations, that can be implemented, and to suggest ways in which the process can be moved forward. This document therefore summarizes the main recommendations put forward over the past decade, identifies some common objectives, and proposes a Strategy and Action Plan, based on partnerships between the industry, the government, private corporations, international organizations and the media.

This document is also articulated with the National Cultural Policy of Jamaica (2003), and the Entertainment Policy of Jamaica particularly in respect of approaches outlined in these policies for the development of cultural industries.

For purposes of this Strategy, the music industry refers to the personnel, services and products generated from the composition of musical works; recording and manufacturing; music publishing; wholesaling and retailing musical recordings; production, retailing and distribution of musical equipment and instruments; promotion, management and agency; administration of copyrights; live performances and tours; music education and training (James, 2001).

Methodology

An approach to the preparation of the National Strategy to develop the Jamaican music industry was devised that would reflect the views of industry, public and private sector stakeholders. The steps taken by the Consultant were as follows:

1. A comprehensive review all previous studies on the Jamaican music industry, and others that bear contextual relevance was undertaken (see list at Appendix 1).
2. The main recommendations from these studies were summarized and used as the point of departure for consultations with stakeholders.
3. Invitations were sent out to a wide cross-section of persons in the industry, the media, public and private sectors. Consultations with private, public and industry stakeholders were conducted between December 2003 and September 2004 in groups or with individuals as appropriate (see a list of participants at Appendix 2).
4. A draft strategy document was circulated for comments.
5. A final consultation meeting was held to further discuss the document.

6. The National Strategy document was finalized incorporating the comments.

Situation Analysis

All the studies conducted on the Jamaican music industry recognize the importance of music as the unique cultural expression and collective consciousness of the Jamaican people. It is one of the country's finest and most recognized exports, that has distinguished Jamaica in the global arena as a significant source of creative talent (Davis, 1996; Kozul-Wright & Stanbury, 2001; Nurse, 2001; Witter, 2002). Music is a product for which Jamaica is respected internationally and in which the country has significant comparative advantage.

The many studies and projects that have been implemented to date have all demonstrated that there is tremendous untapped potential for both public and private interests in the development of the Jamaican music industry. The studies have also highlighted the many forward linkages with other sectors in the economy, namely tourism, sports, information technology, advertising, film and audio-visual production. The music industry has also been deemed important to the "preservation and promotion of national culture, support of local talent, the stimulation of the creativity of the Jamaican population (especially the youth), poverty reduction, job creation, the provision of an increased tax base and consequently improved welfare of the local population" (Kozul-Wright & Stanbury, 1998, p. 19). The possibilities for revenue generation for industry innovators, investors and the government are significant, but the lack of a well coordinated effort to date has severely frustrated significant development of the industry.

Davis (1996, 2004), highlights the strengths of Jamaican music as "a distinctive, recognized, organic brand with global appeal," in which "a diverse product line, an extensive catalogue and talent base" have been developed, which present a wealth of opportunities to be creatively marketed to new and old audiences. Jamaican music is a mature product with an established tour circuit and over 50 years of innovation behind the music, but which is constantly being renewed and re-invented with new compositions and genres. Davis further highlights strengths and opportunities in the industry such as the presence of several state-of-the-art studios in Jamaica with experienced production personnel, and numerous opportunities for marketing and distribution presented by the rapidly evolving digital environment. These include e-commerce and on-line downloads in non-traditional, large markets such Africa, South America and Asia; ring tones for cellular phones and music videos in DVD format. Other opportunities include themed collaborations with the fashion industry, resorts and advertising campaigns; film and animation soundtracks, targeting the health, fitness and children's markets, and inputs for games and software.

Among the many weaknesses and threats discussed in several of the studies (Davis, 1996; Kozul-Wright & Stanbury, 2001; Watson, 1995) is the absence of adequate institutional, legal and financial infrastructure in the public and private sectors to

support integrated planning and policy development, data collection, financing, rights management, marketing and other business support services for the industry. Within the industry, the studies point to the limitations of an informal business culture; a small pool of trained managers, other business and technical support personnel; and the absence of a strong industry body to engage in advocacy and lobbying for greater attention to the needs of its membership. Other weaknesses and threats include lack of political will and the absence of a dedicated ministry or other body to support the industry; piracy in both private and commercial spheres; unequal access to and uncompetitive pricing of new technologies such as broadband; and numerous trade barriers imposed by both domestic and international policy.

However, in spite of the many limitations, Jamaica continues to produce talented exponents of the reggae and dancehall genres, exemplified in the recent international successes of Shaggy, Wayne Wonder, Elephant Man and Sean Paul. This serves to underscore UWI Lecturer, Dr. Michael Witter's point made on a panel discussion at a United Nations meeting in Nassau, Bahamas in January 2004, that unlike mineral and many energy sources, cultural industries (which includes music) are based on a *renewable resource* – that of the creative human spirit. The challenge facing Jamaica at this time is to ensure that we safeguard the development of this creative human resource and build on Jamaica's comparative advantage in music, as a catalyst for developing other competitive export industries based on indigenous talents and knowledge. All the studies suggest that this must be viewed as an indispensable component of Jamaica's development strategy. This charge takes on even more profound relevance given prevailing international conditions where preferential trading arrangements for traditional agricultural exports especially are being phased out under WTO regulations.

It is important to note however, that the Jamaican government has to some degree acknowledged the tremendous potential of the music industry, and taken some steps to promote its development. The National Industrial Policy of Jamaica (1996), a fifteen year plan and policy statement, discussed culture and entertainment as one of the target clusters for development as a non-traditional export and declared the Government's "formal recognition of the entertainment industry, its importance as an expression of the richness of our national culture, and its incorporation as an integral element of the national effort to promote growth and development of the Jamaican economy and society."¹ A new Copyright Law was enacted in 1993, replacing the existing legislation of 1913; the Jamaica Intellectual Property Office (JIPO) succeeded the Copyright Unit in January 2000; an Entertainment Advisory Board and an Entertainment Unit were established in the Ministry of Industry and Tourism in 2001. JAMPRO has consistently provided technical and financial assistance to the sector since the 1980s with some of the outstanding initiatives being an established presence at MIDEM for several years in the late 1990s and publishing a Music Industry Directory. The preparation of a National Cultural Policy (2003) by the Culture Division, Ministry of Education, Youth and Culture, and the waiving of customs duties on musicians' tools of trade by the Ministry of Finance are other public sector achievements worthy of mention. However, the industry perspective is that the Government has not gone far enough, and indeed, policy

¹ Jamaica: The National Industrial Policy (1996); p. 128

support without the necessary budgetary allocation has only served to undermine the government's best efforts to inspire the confidence of industry principals.

Some progress has also been made within the industry to better structure and organize itself. Several collecting societies have emerged since the 1990s, including Jamaica Association of Authors and Publishers (JACAP) in 1998, Jamaica Musical Rights Administration Society (JAMRAS), Jamaica Copyright Licensing Agency (JAMCOPY), Jamaica Performers Administration Society (JPAS) and the Intellectual Property Service Centre (IPC). These societies cover the range of rights management services necessary to realize significant returns within the music industry, but are all in need of capacity building in human resource and financial terms.

Another very encouraging signal that the industry is strengthening from within, is the emergence of the Jamaica Cluster Competitiveness Project (JCCP). The JCCP was initiated in 2003 as a project of the Jamaica Exporters Association, with technical support from the On the Frontier Group based in Boston, USA, and financial support from USAID and DFID. The Project accepted applications from interested industries in Jamaica and selected three clusters that would receive technical support for an initial pilot period of one year in an effort to boost their competitiveness. Entertainment was one of the three clusters selected for development along with Agribusiness (Sauces & Spices) and Tourism, which were all deemed sectors in which Jamaica has a competitive edge.

The Entertainment Cluster was formed with a group of 15 industry members in August 2003, and has since grown to include over 200 members (with 80 active members and 15 international partners ranging from labels such as VP Records, Atlantic Records to institutions like MIDEM and New York University). Local members include music and video producers, studio owners and executives, artists, booking agencies, entertainment lawyers and concert/event planners. The Cluster has spurred collaboration and trust within the industry and has developed three innovative initiatives: 1) The "Where the Hits Are Made" tour 2) the Jamaica Signature Beats (JSB) recording package and 3) An international survey of 80 international record labels in December 2003 (see Appendix 3 for further details). Members of the Cluster have been actively participating in structuring and implementing these initiatives, as well as contributing financially to their goals². This is especially significant because the entertainment industry has had no collaborative effort in its history. Further, Wallis & Kozul-Wright (2001) in their study of *Best Practice Cases in the Music Industry and their Relevance for Government Policies in Developing Countries*, highlight the promotion of clusters and networks as one strategy that has been used successfully in several European countries - a positive indication for the current effort.

Internationally, there is an increasing acknowledgement on the part of international agencies that culture and cultural industries are important to development, to global cultural diversity and to small island developing states. The ACP Ministers of Culture

² Each member of JSB has contributed US\$350 to have their biography and track record captured, posted in the JSB website and promoted for the 3 month period of June- August 2004.

first met in Senegal in June 2003 and affirmed the importance of cultural industry development in African, Caribbean and Pacific countries in the Dakar Declaration and Plan of Action. The UN Secretary General's report on the implementation of the Barbados Programme of Action over the past decade to the UN Commission on Sustainable Development in April 2004, highlighted culture and cultural industries as a new and emerging area of significance to Small Island Developing States (SIDS). The UNDP's *Human Development Report (2004)* is titled "Cultural Liberty in Today's Diverse World," and also highlights trade in cultural goods as an important means of widening choices through creativity and diversity. UNESCO remains at the forefront of the promotion of culture and cultural industries, and its 2000 Study on *International Flows of Cultural Goods, 1980-1998* documented trade in cultural goods as being among the fastest growing sectors in the world economy.

Industry Profile

All the studies highlight the absence of data on the industry and the adverse implications of this information gap for the development of appropriate public policy and planning to support the industry. Information is needed on the structure and dynamics of the industry as it relates to capital formation and job creation, the growth of earnings, profitability, product diversification, productivity and competitiveness, market possibilities and earnings (James, 2001). Witter (2002) points out that "It is difficult to imagine the industry developing without a better understanding of the structure of its costs, the potential markets that it can tap, and the flows of incomes accruing to the various participants in the industry. Without music entrepreneurs recognizing that more information is in their business interests, it is difficult to see how the quality of data available for analysis will improve (p. 58)."

Working with the limited data available, Witter (2002), estimated the size of the international market for reggae as US\$60-75 million, with an upper limit of US\$100 million. Revenue earned from shows and dances in Jamaica in 2000 was estimated conservatively at J\$160 million, and approximately 6-10,000 persons are directly employed in the music industry (Stanbury, 2003; Witter, 2002). There are an estimated 75 studios in Jamaica and more than 200 if home studios are included, and more than 200 recordings are released each week (Witter, 2002). The Economic and Social Survey of Jamaica (2003) reported a 15.7% increase in exports of recorded music in the first six months of 2003, over the same period in 2002. The United Kingdom and the United States continue to be the main markets for Jamaica's music, accounting for 73.9% and 13.2% respectively, of the total value of the recorded music exported in 2003. These estimates further underscore the tremendous potential of the industry.

Several of the studies also characterized the industry as highly fragmented, dominated by small and medium enterprises, lacking a formal market institutional structure, led by a few dominant record labels, and operating with a dual industrial structure where only a minority of well-known artists have succeeded in international markets (Davis, 1996, Kozul-Wright & Stanbury, 1998, Witter, 2002).

Recommendations from the Main Studies

All of the studies reviewed made a number of valuable recommendations for the further development of the Jamaican music industry. These can be summarized under the following headings:

1. Human Resource Development, Training and Technical Assistance
2. Institutional Strengthening and Capacity Building
3. Copyright Administration, Publishing and Anti-Piracy
4. Research & Development and Data Collection
5. Marketing and Distribution
6. Technology and the Media
7. Product Development
8. Legal and Policy Framework
9. Financing and Business Support Services
10. Infrastructure and Venues
11. Sector Linkages
12. Regional collaboration

Following is a problem statement for each of the issues which highlight the obstacles in each area to the development of the music industry, followed by some of the main recommendations made in the studies.

1. Human Resource Development, Training & Technical Assistance

Problem statement: There is a lack of adequately trained persons in the industry in terms of musicians, managers, technical and business support personnel. Music is being offered in a very limited capacity at the primary, secondary and tertiary levels, and there is an inadequate supply of trained music teachers to support the curriculum. There are many gaps in the training opportunities offered at the various training institutions in Jamaica.

Recommendations:

- Coordination & strengthening of training institutions (UWI, HEART-VTDI, Exed, Edna Manley, UTECH, CPTC etc).
- Need flexibility in training through short term professional development series, on-the-job and refresher courses.

- Training to cover artistic, business, managerial, technical, musicianship, technological and copyright.
- Properly structured music education at all levels of the school system (primary through tertiary), and where possible, out-of-school initiatives.
- Initiate career guidance for music and entertainment; IP awareness (in all disciplines) and address the business of music at secondary and tertiary levels.
- Choirs and performing arts companies in schools to understand the business potential.
- Establish a Performing Arts High School.
- Encourage successful artists to contribute to training and scholarships.

2. **Institutional Strengthening and Capacity Building**

Problem Statement: One of the main obstacles to the development of the music industry is the absence of strong institutions and professional associations in both the public sector and in the industry to facilitate innovation, export and overall sector development. Existing organizations are underfunded, there is no clear lead government agency for the industry and there is duplication in several functions.

Recommendations:

- A single government entity should be established or strengthened to be responsible for music & entertainment, staffed with industry specialists and informed officials. This entity should have a marketing arm located in North America and the UK.
- Conduct a needs audit of existing agencies to identify resource gaps.
- Rationalise public sector spending in several agencies, namely JAMPRO, Entertainment Unit, Culture Division and the Jamaica Cultural Development Commission.
- Strengthen industry associations (JFM, JAFA, Entertainment cluster) and form new ones of producers, promoters, festival managers etc.
- Promote attachments and internships for high school students, HEART trainees and others in tertiary institutions.
- Encourage the development of industry standards and rates.

- Establish a Music Development Foundation to plan and manage training initiatives.
- Facilitate joint ventures and creative partnerships between Jamaican record companies and medium-sized foreign distributors.

3. **Rights Management, Publishing and Anti-Piracy**

Problem Statement: Collecting societies in Jamaica are embryonic and weak. There is still a relatively low appreciation among artists and managers of the long-term importance of developing strong local rights management organisations and as a result, registration with foreign companies is still the norm in the industry. There are significant sums of uncollected royalties owed to Jamaican artists, notably in France. The result of weak capacity in this area is a net outflow of royalty payments from Jamaica. Though not precisely quantified, piracy continues to be a major threat to the industry.

Recommendations:

- Strengthening of rights management organisations.
- Embark on a major thrust for international royalty collection.
- Implement a sustained public education campaign on copyright and anti-piracy.
- Strengthen the enforcement capability of the police, customs and magistracy (night court or special court).
- Introduce a private recording levy on blank tapes and CDs and hardware for reproduction.

4. **Research & Development and Data Collection**

Problem Statement: There are no well designed and implemented systems of data collection on the industry, either by the government or the industry itself. The result is an absence of good data on employment, costs, sales, income, markets, performance or contribution of the industry to the Jamaican economy. As such the industry is characterized by uneven and ad hoc development, without the requisite support from the government and the private sector. Music industry entrepreneurs are reluctant to provide the necessary data on their operations due to mistrust of government and for purposes of tax evasion.

Recommendations

- Sensitize management and improve the capacity of the Statistical Institute of Jamaica, the Planning Institute of Jamaica and the Bank of Jamaica to collect data on the industry.
- Commission an international music marketing/ state of the industry study.
- Increase the supply of data on the sector to international bodies (IFPI etc.).

5. **Marketing and Distribution**

Problem statement: The efficient and effective distribution of music products and services is a major problem facing the industry. Artists and entrepreneurs are reliant on international labels (none of which have established an office in Jamaica) for distribution in extra-regional markets and as such are not in control of the process. Further, there are few distributors of Jamaican music in the main markets in the United States, United Kingdom and Japan. There is inadequate market intelligence, limited market penetration, an inadequate number of high quality music videos, and short term planning in the industry. There is no dedicated media channel for the promotion of Jamaican/ Caribbean music and other cultural goods and services, which limits the ability of Jamaican labels to reach their target market and ensure airplay of their music.

Recommendations:

- Expand earnings from overseas tours by increasing the number of tours and venues for performance.
- Expand merchandising initiatives.
- Increase participation at trade fairs.
- Develop a comprehensive marketing and publicity strategy for the industry.
- Engage in niche marketing.
- Secure 1% of the estimated US\$40 billion market (2002 estimate) for recorded music over the next 5 years, to realize US\$400 million in revenues for the music industry.
- Host a regional music/cultural trade fair every two years.
- Establish e-commerce capability for internet marketing and distribution.

6. Technology and the Media

Problem Statement: The media are not as supportive of the music industry as deemed necessary – the media are perceived as overly critical and sensationalist in their coverage of artists especially. Foreign music content is still very high on many radio stations and payola continues to be a problem. There is insufficient collaboration between the information technology sector and the industry to create innovative products for export and on-line distribution.

Recommendations:

- Upgrade studio equipment and CD manufacturing.
- Develop an internet marketing and distribution programme.
- Develop more joint radio and TV programming between the industry and the media for educational and entertainment purposes.
- More collaboration between the industry and the information technology sector to create multi-media products for the tourist market and for educational purposes.
- Establish a music portal.
- Establish a regional media entity dedicated to music/entertainment promotion.
- Introduce local product content quotas for radio & TV.

7. Product Development

Problem Statement: The challenge facing the industry is how to sustain the gains made to date and ensure its continued expansion. Many persons active in the Jamaican music industry are perceived as inconsistent, unreliable and unprofessional in their business relations. There is need for a consistent supply of dynamic and innovative music products that is not currently being fulfilled.

Recommendations:

- Facilitate/encourage collaborations between local and foreign artists, songwriters, & producers.
- Promote themed entertainment such as festivals and events that incorporate music.
- Provide ongoing professional development workshops for artists.
- Conduct research and development for new products.

8. **Legal and Policy Framework**

Problem Statement: Government policy and institutions related to the music industry are fragmented and lack coordination. More government-industry partnerships are needed in both the creative and business aspects of the industry. There has been weak governmental support in terms of industrial, trade, IP and educational policies. The legislative framework is lagging behind the technological and other developmental needs of the industry.

Recommendations:

- Establish/harmonize government policy – industry, trade, IP, media, culture and education.
- Formulate a comprehensive music industry development plan (3-5 year plan).
- Create a legislative and regulatory framework for electronic commerce.
- Introduce local product content quotas for radio and television.
- Monitor and disseminate information on trade policy negotiations as they affect the industry.
- Improve enforcement of the Copyright Act.

9. **Finance and Business Support Services**

Problem Statement: The success of the music industry has been achieved largely through the creativity, courage and resources of a few committed musicians, artists and managers, largely from the working class, with little or no institutional help. The music industry is not accorded the same level of financing and business support that is offered to other sectors in the economy. Mainstream financial institutions lack a real understanding of the industry, which they view as risky, disorganized and informal.

Recommendations:

- Provide financial support for record producers and labels.
- Establish a venture capital fund and a grant-making fund.
- Expand access to credit.
- Secure more financial sector partnerships and investments.
- Develop a tax and incentive scheme.

- Establish business support services (planning, advice, marketing, training).

10. **Infrastructure and Venues**

Problem Statement: In spite of the fact that Jamaica hosts hundreds of festivals annually and that excellent climate is enjoyed almost year-round, the country lacks proper indoor & outdoor venues to support music festivals, shows & concerts. Facilities for training and professional development need to be expanded.

Recommendations:

- Establish a multi-purpose venue – a National Performing Arts Centre.
- Establish a multi-purpose venue in Montego Bay.
- Develop small to medium-sized venues islandwide (200-600 capacity).

11. **Sector Linkages**

Problem statement: Music provides other sectors in the economy with opportunities to diversify and enhance their product base – tourism, information technology, broadcasting, film, sports, fashion. These inter-sectoral linkages have not been sufficiently acknowledged and cultivated in a comprehensive manner.

Recommendations:

- Develop a joint marketing strategy with the tourism sector through hotel shops, airports, cruise ships, ports, vendors.
- Facilitate collaborations between the film & video industries to create better music products for export such as music videos and multi-media CDs.
- Encourage collaborations with the IT, advertising, fashion, and sports sectors.

12. **Regional collaboration**

Problem statement: By January 2005, the CARICOM Single Market & Economy will be a reality, providing a new context in which the industry will operate. Artists and musicians have already been granted free movement throughout the region without work permits (as of August 1, 2003). Although it has been contemplated, there has been no significant attempt to create a regional association of persons in entertainment, or to create other mechanisms for regional collaboration among industry persons. A regional approach provides a larger market for goods and services and there are several areas in which regional collaboration would be more cost effective.

Recommendations:

- Establish a regional data and rights management centre.
- Establish/strengthen a regional organization to promote music and cultural products and services.
- Strengthen regional capacity for international trade negotiations in services and IP.
- Strengthen a regional cultural fund.
- Establish a regional media entity to promote music and entertainment products and services.
- Establish regional professional associations such as a Recording Industry Association of the Caribbean and music festivals association.

Stakeholder Consultations

Consultations were held with stakeholders in the music industry between December 2003 and August 2004. A total of 45 persons attended the meetings or were interviewed separately, and provided feedback on the documents prepared for the consultations. Participants in the discussions were asked to identify the top 5-10 priority strategies or interventions that they deemed necessary to develop the music industry in Jamaica. The participants were consulted in groups, comprised of persons from the music industry, the public sector and the financial sector. Participants from the media and educational institutions attended either the music industry or public sector consultations. The various group perspectives arising from the consultations are reflected below.

Industry Group

The music industry participants felt that too many studies had been done to date with little action arising from these studies. There was a strong feeling that the Jamaican government needs to do much more to demonstrate that the industry is viewed as valuable to the country, has significant economic potential and is deserving of similar incentives and business support schemes that are extended to other industries deemed to be part of the “productive” sectors in the economy. The group felt that greater respect should be shown to the industry and to artists, especially because it was felt that music has the potential to contribute as much or more to the economy as tourism. The industry group acknowledged that there was the need for a strong industry association to better lobby government and private financial concerns for more support. The group reiterated a long-standing appeal for a dedicated quasi-government institution to address music (culture and entertainment) issues, much like the Music Board that has

been established in Ireland. The industry group also highlighted the need for the government and/or the industry to work together to:

- Improve music education in schools;
- Establish a National Performing Arts Venue and upgrade the Louise Bennett and Ranny Williams venues;
- Establish content quotas for radio;
- Change negative public perceptions of the industry;
- Introduce legislation for on-line business transactions;
- Fast track the long debated Entertainment Encouragement Act;
- Establish a music marketing office overseas;
- Develop a reggae chart and a dancehall chart;
- Establish Music Awards in the industry;
- Certify and register industry persons especially in light of the recently introduced “free movement” of artists and cultural workers under the CARICOM Single Market and Economy;
- Take strong action to address piracy;
- Ensure that tourism officials work more closely with the music and other cultural industries to promote more synergies between these sectors;
- Put greater emphasis on marketing in non-traditional, large markets in Africa, South America and Europe where there is significant demand for Jamaican music;
- Look at current practices internationally for financing the industry – such as *securitisation*³ and the establishment of *guarantee funds*⁴ – with a view to introducing these mechanisms in Jamaica;

³ Securitisation is a new practice based on partnerships and agreements between artists/managers, the financial sector and rights management organizations, where an artist with a significant catalogue is assisted in putting a value to that catalogue so that it can be used as collateral for financial assistance.

⁴ Guarantee funds enable lending agencies such as banks and other specialized financial institutions to fund projects that would otherwise be considered “too risky” in the framework of a commercial operation. The shared risk can be based on a public-private sector partnership or between private entities locally and/or internationally. The shared risk allows financiers to provide more support to cultural industries at lower interest rates.

- Promote mutually beneficial collaborations between the business sector, the government and artists on tour, to promote Jamaica, its goods and services;
- Ensure collaboration at the highest level between the Parish Councils, the police and JACAP in issuing licenses for events, to ensure that play lists and other requirements are met by promoters, for purposes of rights management;
- Educate artists and managers on their obligation to provide the required information to officials in the countries visited on tour, to support the international drive to collect royalties;
- Ensure greater access to low-cost, high speed broadband technology for on-line distribution of products and services;
- Trademark national brands and ensure greater benefit from international campaigns using Jamaican images and brands as in the current Puma marketing strategy.

Public Sector Group

The public sector group, including representatives of JIPO, HEART Trust-NTA, Ministry of Education, Youth & Culture, the Entertainment Unit and the Institute of Jamaica, expressed a willingness to work with individuals and organizations in the music industry to help to improve the state of the sector. However, they also felt strongly that the industry must be willing to better organize itself and to provide more information. Public sector representatives expressed the view that there needs to be a system of registering persons in the industry, and a willingness to supply data on industry costs, income, personnel, production and sales, among other types of data. It was felt that this type of information was essential to planning for the sector, to improving the policy and legislative framework, and to introducing tax and other incentives. They highlighted the Irish experience with their music industry as one that should be examined in greater detail for best practices.

HEART Trust-NTA indicated a willingness to assist in establishing training and certification standards, and in documenting occupational categories for the industry. Jamaica Business Development Centre has already been working with persons in the industry, and in 2003 ran a 3-month programme that focused on voice training, music appreciation, the business of music, and the production of a demo. The programme will continue in 2005 with support from the Government, but will narrow its focus to business development only. JBDC representatives felt strongly that in order to improve the music sector, it has to be seen as a business and treated as such by the public and financial sectors and also by persons active in the industry.

The persons interviewed at the Statistical Institute of Jamaica and the Planning Institute of Jamaica indicated that they need more information on the way the industry is structured and on how it functions in order to provide better support for data collection.

They highlighted the tremendous difficulties encountered in collecting data from persons in the industry due to mistrust and tax evasion, but indicated a willingness to work with the industry to collect better data. Representatives of STATIN advised that they first need a seminar to better understand the industry, followed by funding for a baseline study to analyse and identify indicators that they can track over time. In the interim however, it may be possible to incorporate more data collection in existing studies conducted by the institution (such as the Labour Force Survey, Survey of Living Conditions, Business Establishments Survey) after they have a better understanding of how the industry functions.

The Financial Group

Financial sector participants including representatives of the National Commercial Bank (NCB), Scotia Bank, Development Bank of Jamaica (DBJ) and Pan Caribbean Financial Services, all expressed an interest and a willingness to work with the music industry to meet its financing needs. They indicated that very few proposals (if any) have been submitted to their institutions for support in the last 5 years, and that most often, the proposals were not properly prepared and did not address basic questions to qualify them for assistance, such as how the finances would be used and repaid. The music industry is viewed as “risky” by this group, especially when it is not a well-established artist applying for assistance.

It was felt that commercial banks have too many restrictions, an obligation to depositors to invest in viable projects and an inability to provide funds at sufficiently low interest rates to really assist a fledgling industry directly. In this context, music industry proposals need to meet the same rigorous criteria that are applied to any other proposal for funding in the commercial banks, supported by a business plan. It was therefore felt that the development banks including DBJ and the National Investment Bank of Jamaica (NIBJ) should take the lead in financing the sector. An institution like Pan Caribbean Financial Services that has experience with equity funding⁵ and which also administers some grant funding from international partners such as the EU, is another potential partner. It was also pointed out that the Government should send a signal to the financial sector that music and entertainment should be considered one of the productive sectors of the economy, to which preferential interest rates and other considerations should be extended. The group acknowledged that bankers and financiers need to take the industry more seriously and to see the industry as a business, however, they also felt that persons in the industry need to be more disciplined and professional in their approach. The industry is seen as too loose in structure, unpredictable and inconsistent in its performance. A long-term approach to financing the sector with lower cost money was therefore recommended by the group.

⁵ The Trafalgar Development Bank which used to administer venture capital funding, bought Pan Caribbean Merchant Bank and became Pan Caribbean Financial Services.

Strategies and Actions to Develop the Jamaican Music Industry

As regards the top 5-10 priority strategies and actions needed to develop the Jamaican music industry, the most frequently identified responses by the groups (from most to least frequently identified) were as follows:

1. **Training** was most frequently identified as a necessary intervention to move the industry forward. Training in both the artistic, technical and especially managerial aspects was highlighted, as was training at all levels of the educational system – from primary through tertiary and in teacher’s colleges. Career guidance at the school level was also viewed as important. The Edna Manley College of the Visual and the Performing Arts needs to be strengthened to meet the needs of the music industry, especially by offering short professional development courses, and remedial Mathematics and English was also recommended for artists and managers especially. Documentation of occupational categories with a view to setting standards for training and certification was also recommended, in which HEART/NTA would take the lead.
2. **Incentives** for the industry, and in particular tax exemptions and tax shelters in terms of income, tools of trade, duties etc. was highlighted frequently by stakeholders. This move on the part of the Jamaican Government is seen as indispensable in developing a stronger relationship between the industry and the government. It was further suggested that a study of how the Irish and other governments have approached this issues would be instructive.
3. **Marketing and business support services** were highlighted as critical to developing the music industry. JAMPRO, the Entertainment Unit and the Entertainment Board currently provide some assistance to the industry but it was felt that the level of support should be significantly increased. Marketing support would assist persons in the industry in breaking into new markets, provide assistance to attend music industry trade shows, and assist with data collection on sales and income. It was suggested that greater emphasis should be placed on non-traditional and large markets in Africa and Europe where there is a significant demand for Jamaican music.

Other business support services will assist industry persons to develop business plans, gather market intelligence, secure financing, among other outputs. An international marketing study to assess the degree of penetration and level of earnings in the major markets for reggae was also recommended.

4. **Capacity building of industry organizations and associations** was also highlighted as an important factor. Strengthening of collecting societies is essential to improving the earnings from the sector and addressing piracy, and assistance to professional associations such as the Jamaica Federation of Musicians and the Jamaica Association of Female Artists is necessary to

improve the industry's capacity for advocacy. The need to create new associations of publishers, festival organizers, among others was also highlighted.

5. **Dedicated Industry Organization** - Industry stakeholders also identified the pressing need for rationalization in Government spending in the area of music and entertainment, and called for the establishment of a dedicated industry organization - in the form of a Ministry or Promotional Board that would be charged specifically with promoting the development of the music industry. Government policy is viewed by industry stakeholders as highly fragmented as regards music and culture, with several under-resourced agencies (JAMPRO, JIPO, Entertainment Unit, JCDC, Ministry of Education, Youth and Culture) and no clear lead agency. This dedicated institution should have an overseas arm in the main markets for reggae, namely North America and the United Kingdom. The overseas component could be aligned with the government's foreign embassies and high commissions. Examination of the Irish model was highly recommended.
6. **Finance and Investment** - Financing for the industry was also raised as an important input needed for its further growth and development. The sources of the funding should be both public and private and should include venture capital, grant funds, and loans. This would provide much needed resources for training, marketing, new ventures etc. Investments are needed for the development of better venues.
7. **Public education** was also raised as another important intervention that is needed to underscore the importance of the industry to Jamaica, to highlight the many career and business opportunities in the industry, combat some of the negative perceptions, launch an anti-piracy campaign and promote greater respect for intellectual property. The need to raise levels of awareness among public and private sector officials in the Ministries responsible for trade, finance, tourism, legal affairs, customs and the police and private and financial sector leaders on the importance and needs of the industry was also highlighted.
8. **Policy development and alignment** in terms of better coordination with education, planning, taxation, tourism, youth and sports policies was also highlighted as another necessary strategic intervention. It was felt that policy-makers needed to be made more aware of the importance of the industry, made to understand that it is a potentially lucrative business and that it should feature more significantly in a range of related policies besides the culture policy. More partnerships and joint ventures between the music, tourism and sports sectors were strongly recommended.
9. **Venues** - The development and upgrading of venues for shows, concerts, training and recording was highly recommended by stakeholders. The view was expressed that there should be a small venue in every parish (1,000

persons) and a national multi-purpose venue with a capacity of 5,000 in a covered or semi-enclosed space.

10. **Data collection** - The need for better data collection on the sector was highlighted and in this regard, the capacity of the Statistical Institute of Jamaica (STATIN) and of the Planning Institute of Jamaica (PIOJ) was to be significantly upgraded to meet this need.
11. **Registration** of music industry personnel and facilities was also recommended to support the data collection thrust. This was viewed by the public sector stakeholders as a critical act on the part of the industry to build a better relationship with the government, which would allow for better planning and management of the industry.
12. **Recognition and commemoration** - There was also the call especially on the part of the industry stakeholders, for greater recognition of the contribution of the industry and many of its outstanding proponents. This could take the form of awards, archives, museums, a virtual resource library, Reggae Hall of Fame, a Museum of Popular Jamaican Music and media coverage. Industry persons emphasized the need for a Museum of Popular Jamaican Music and a Hall of Fame, to ensure that Jamaica gives due recognition to outstanding musicians and artists who have served as ambassadors for the country and to ensure that the most comprehensive archive available anywhere in the world on Jamaican music is located in Jamaica.
13. **Strategic Plan** - Stakeholders also highlighted the need for a 15 year Strategic Plan for the development of the industry.
14. **Partnerships** - There was also a call for greater collaboration and strategic partnerships between government, private corporations and the industry.
15. **Legislative support** through finalizing and passing the Entertainment Encouragement Act (which was first introduced approximately 10 years ago) and enforcement of the Copyright and Legal Deposit Acts were also suggested as necessary to developing the music industry. The need to strengthen legislation in respect of trademarks and patents was also highlighted.

It was evident that the views expressed by stakeholders were consistent with the main recommendations arising from the studies. What clearly emerged from the consultation process was that there are certain common needs and strategic objectives to be met to build the capacity of the Jamaican music industry and generate further growth and development. However, these objectives can only be realized through complementary actions on the part of the industry, the government, the media and private corporations.

National Strategy & Action Plan

Strategies

Based on the studies and the consultations, six strategies for the development of the Jamaican music industry were identified as follows:

1. Create an enabling environment for the development of the industry by way of incentives, relevant policies, data collection, legislation and enforcement, promoting intersectoral linkages (sports & tourism) and by developing stronger institutions in the music industry and the government to serve the industry.
2. Increase market share for the Jamaican music industry through a better structured, targeted and effective system of marketing and promotion.
3. Increase the profitability of the music industry by strengthening collecting societies and by stepping up anti-piracy efforts and measures.
4. Improve the Jamaican music product and ensure continued standards of professionalism in service and product delivery, by creating mechanisms to identify and develop new talent, and by providing on-going training opportunities for industry persons; by continued market research and the development of new and innovative music products and services.
5. Increase the level and diversify the range of financing opportunities available to the music industry, including venture capital, grants and loans from government, private and international sources.
6. Create stakeholder buy-in through public education to combat piracy and change negative attitudes; celebrate and commemorate industry achievements and heroes.
7. Coordinate and strengthen training institutions and increase training opportunities in music education and professional development.

These strategies can be implemented through collaboration and input from the industry, government, corporate and international parties as detailed in the Action Plan in *Tables 1 - 7*.

ACTION PLAN

Table 1

Strategy 1: Create an Enabling Environment
 Create an enabling environment for the development of the industry by way of incentives, relevant policies, data collection, legislation and enforcement, promoting intersectoral linkages (sports & tourism) and by developing stronger institutions in the music industry and the government to serve the industry.

| Action | Industry | Government | Private Firms & the Media | International Agencies & Private Foundations |
|--|--|--|---|---|
| Introduce tax and other incentives | Industry to present recommendations and justifications; should also be tax compliant | Ministry of Finance, Ministry of Education & Culture, Entertainment Unit to take lead role | - | Provide information on similar initiatives in other countries and technical assistance |
| Coordinate and develop inter-agency policies and intersectoral linkages | Industry to present recommendations | Ministry of Tourism, PIOJ, Ministry of Sports, Ministry of Culture, Ministry of Trade; JAMPRO and Entertainment Unit to spearhead policy coordination and collaborations | - | Provide information on best practices in other countries |
| Improve national data collection | Industry to provide data on recordings, employment, sales, income, expenditure | STATIN & PIOJ to be strengthened for these purposes | Collaborations with private marketing & research firms possible | Provide technical assistance & information on data collection models and initiatives in other countries. Financial support to local initiative. |

Music Industry National Strategy & Action Plan

| Action | Industry | Government | Private Firms & the Media | International Agencies & Private Foundations |
|---|---|--|--|--|
| Pass Entertainment Encouragement Act; introduce legislation to facilitate e-commerce and regulation of the digital environment; enforce relevant legislation - Copyright & Legal Deposit Act | Industry to further lobby for EEA and enabling legislation for online transactions and e-commerce. Industry members to be compliant with other legislation | Fast track and priority attention to EEA and e-commerce legislation; enforcement of existing legislation to be addressed | Should be compliant with legislation | - |
| Establish a dedicated music industry organisation | Industry leaders to participate in development and design of organization | Government to provide resources and ensure establishment | - | Financial support for start-up expenses |
| Strengthen Rights Management Organisations | Societies to present strategic plan for development | Assist in seeking external funding to support the | - | Technical Assistance, Financial support & training opportunities |
| Upgrade & develop new venues | Industry integral to design and needs assessment | Government to provide resources & technical expertise | Engage corporations in sponsorship deals | Financial support |
| Coordinate, review & upgrade training institutions & programmes | Industry to provide information on needs & data on existing training levels in the industry | HEART Trust/NTA, Edna Manley College, UWI, UTECH to collaborate and rationalize | Assist in providing scholarships | Financial support |
| Strengthen and create professional associations (JFM, RIAJAM, JACAP, Sound System Association of Jamaica etc.) | Industry to better organize itself & create new associations of promoters, producers etc. | Assist in seeking external funding | - | Financial assistance Training opportunities Technical assistance |
| Increase access to computers & the internet, especially broadband technology | Industry to articulate needs and introduce a strong lobby | MOEYC, Entertainment Unit, JAMPRO and Ministry of Technology to devise strategy to address the issue | - | Financial support Technical assistance |

Table 2

Strategy 2: Increase Market Share
 Increase market share for the Jamaican music industry through a better structured, targeted and effective system of marketing and promotion.

| Action | Industry | Government | Corporate | International Agencies & Private Foundations |
|--|--|---|---|---|
| Establish an international marketing company based in the US and UK for music & entertainment promotion | Industry to be integrally involved in development of the institution | Government funded, linked to the dedicated industry organization & to the system of foreign embassies/high commissions | Provide financial assistance for special projects eg. international marketing study | Financial support for special projects |
| Establish a regional radio and television station dedicated to promoting music and other cultural products/services regionally and internationally | Industry organizations to organize licensing deals with the new entity for its membership. Industry to provide quality content on a consistent basis | Government to assist in raising capital for the venture | Joint venture with private corporation and/or existing media entity | Assist in providing training opportunities and start-up grant |
| Maintain a consistent presence at international music industry trade shows | Organise and collaborate to put forward high quality showcase | Financial support (JAMPRO, CHASE etc.) | Promotion deals for companies in travel, beer, rum, coffee, entertainment etc. | Financial support |
| Expand overseas tours, and markets for music especially non-traditional markets eg. Africa & South America Set a target to secure 1% of the US\$40 billion worldwide market for music over next 5 years | Industry organization to take the lead | Entertainment Unit, Dedicated ministry to support and facilitate tours and market intelligence gathering Commission an international music marketing study | Sponsorship deals | Financial support for music marketing study and other initiatives |

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| Action | Industry | Government | Corporate | International Agencies & Private Foundations |
|--|---|--|-------------------|---|
| Increase merchandising | Industry organization to take the lead with IP specialists | - | Sponsorship deals | - |
| Develop a stronger internet marketing & distribution system | Industry to lead the initiative | Entertainment Unit, Dedicated ministry & marketing agency to support | Sponsorship deals | Provide technical assistance |
| Host a regional trade show in Jamaica | Several existing ventures to be strengthened - Caribbean Music Expo, Reggae Music Expo etc. | JAMPRO, JTB, Entertainment Unit & dedicated ministry to support | Financial support | Financial support |

Table 3

Strategy 3: Increase the Profitability of the Music Industry
 Increase the profitability of the music industry by strengthening licensing bodies and by stepping up anti-piracy efforts and measures.

| Action | Industry | Government | Corporate | International Agencies & Private Foundations |
|--|--|--|----------------------|--|
| Strengthen Rights Management Organisations | Rights management organisations to articulate development plan | Assist in seeking external funding Collaborations at the highest level between the police, JACAP and Parish Councils in issuing licenses for events | - | Financial support & technical assistance to collecting societies |
| Launch a major drive for international royalty collection | Industry principals to spearhead the initiative Industry to acknowledge/educate on its obligations when touring to ensure collections - appropriate documentation | Ministry of Foreign Affairs and MOEYC to give support | - | Financial support for initiative |
| Launch sustained public education campaigns on intellectual property, rights management and anti-piracy | Industry principals to play integral role | Entertainment Unit & JIPO to take the lead in collaboration with industry & the media | Financial assistance | Financial assistance |
| Strengthen the enforcement capability of the police, customs & magistracy | Industry to support & provide information | Ministry of National Security to collaborate with JIPO on this issue | - | Provide information on best practices in other countries |

Table 4

Strategy 4: Improve the Jamaican music product through research and development
 Improve the Jamaican music product and ensure continued standards of professionalism in service and product delivery, by developing mechanisms to hone and expose new talent, by providing on-going training opportunities for industry persons, by continued market research and the development of new and innovative music products and services.

| Action | Industry | Government | Corporate | International Agencies & Private Foundations |
|---|---|--|---|--|
| Identify and develop new talent | Professional associations & promoters to take the lead | JCDC and the Edna Manley College to develop a strategy and take the lead | Sponsorship of various events & media programmes to expose talent & for professional development & training | Provide training & other opportunities |
| Ensure ongoing training opportunities | Industry to provide information on needs & data on existing training levels in the industry Involve experienced artists in mentorship and nurturing of new entrants; develop training proposals to meet industry needs | HEART Trust/NTA, Edna Manley College, UWI, UTECH to collaborate, rationalise and establish stronger links with the industry Provide more support for short-term training programmes | Assist in providing scholarships | Financial support |
| Conduct ongoing market research | Seek partnerships with universities & private research firms to produce research | Entertainment Unit, Dedicated ministry & overseas marketing arm to take lead - conduct periodic research | Collaborate with private research firms | Financial assistance |
| Increase R&D for music products & services | Partnerships with universities & industry innovators | Entertainment Unit, Dedicated ministry to be involved in the process & to advise, based on research | Provide venture capital | Assist with venture capital & grants |

Table 5

Strategy 5: Develop Financing Solutions and Partnerships for the Jamaican Music Industry
 Increase the level and diversify the range of financing opportunities available to the music industry, including venture capital, grants and loans from government, corporate and international sources.

| Action | Industry | Government | Corporate | International Agencies & Private Foundations |
|---|--|--|---|--|
| Establish venture capital, grant and loan financing | Industry organization to collaborate with financial partners Industry to articulate its needs | Assist in seeking international sources from agencies and donor countries through the PIOJ, DBJ, NIBJ and other agencies | Particular commercial or other banks to be solicited & enlisted | World Bank, UNESCO, UNDP, USAID, donor countries, private foundations, Caribbean Development Bank to give support, facilitate and manage funds where appropriate |
| Awareness building and sensitization of the financial sector | Industry to assist in the design and to participate in sensitization seminars | MOEYC, JAMPRO and Entertainment Unit, Ministry of Finance, DBJ and NIBJ to assist and participate | Support seminars to sensitise management of financial institutions | Financial support |
| Develop new approaches to financing eg. floating a bond certificate, securitisation, establish guarantee funds | Industry to work with financial partners | Ministry of Finance, MOEYC, Entertainment Unit to take the lead in bringing local and international partners together to devise new approaches | Commercial banks and other financial institutions to collaborate with government and international partners to develop new mechanisms | World Bank, Caribbean Development Bank & other international financial institutions to participate, especially for infrastructural development |
| Negotiate sponsorship deals and encourage investments in infrastructure and other ventures | Industry to make proposals - from production initiatives to merchandising, venue and training facilities | Jamaica Tourist Board and JAMPRO to assist | Enlist support from private corporations | - |

Table 6

Strategy 6: Create stakeholder buy-in
 Create stakeholder buy-in through public education to combat piracy and change negative attitudes, celebrate and commemorate industry achievements and heroes.

| Action | Industry | Government | Corporate | International Agencies & Private Foundations |
|---|---|---|---|--|
| Increase public education programmes on the value of IP, the importance of the industry, career opportunities, & anti-piracy messages | Industry organization to collaborate with government & the media to develop appropriate programmes | Entertainment Unit, dedicated agency, JIS & JIPO, to collaborate in designing the programmes | Private media involvement to be enlisted Private corporations to sponsor the campaigns | Financial assistance necessary |
| Education and sensitization of relevant public officials in trade, culture, entertainment, IT, customs, judiciary, and financial sector managers | Industry to assist in the design and to participate in sensitization seminars | MOEYC, JAMPRO and Entertainment Unit, Ministry of Finance, DBJ and NIBJ to assist and participate | Financial support for sensitization seminars | Financial support |
| Commemoration of industry achievements a. Museum of Popular Music & Hall of Fame b. Industry Awards c. Radio/TV series on music giants etc. d. Music library/ archive accessible online and through parish libraries | Industry to take the lead in collaboration with government, corporate & international partners (a, b, c, d) | Government initiative (a) to be better financed & accelerated; Government to provide technical, financial and infrastructural support (a, c, d) | Sponsorship deals for corporations (a, b, c) Grant support from corporations (a, b, d) Private media to collaborate (a, b, c) | Support from private foundations, international agencies and donor countries (a, c, d) |

Table 7

Strategy 7: Coordinate and strengthen training institutions and increase training opportunities
 Expand the range and quality of music education and training available at all levels of the educational system, for the professional development of persons in the industry and for out-of-school youth.

| Action | Industry | Government | Corporate | International Agencies & Private Foundations |
|--|--|--|--|--|
| Coordinate and streamline existing training programmes | Industry to articulate its needs | Edna Manley College, HEART-NTA, UWI, UTECH, CPTC, EXED to collaborate, identify gaps & needs; develop a plan | - | World Bank, UNESCO, UNDP, USAID, WIPO, donor countries, private foundations, Caribbean Development Bank to give support, facilitate and manage funds where appropriate |
| Introduce short-term professional development series; remedial Math & English for some artists | Industry to articulate its needs | HEART-NTA to take the lead and collaborate with interested institutions | Support with scholarships | - |
| Expand the range of training available – artistic, technical, managerial, legal | Industry to articulate its needs | Educational institutions to collaborate and involve departments of law, business and education | Provide scholarships and programme support | Provide technical assistance |
| Introduce a better structured music education programme at all levels of the educational system; instruments, career development, IP awareness, business of music | Industry to be consulted and to give support | MOEYC to develop a plan and lead, in collaboration with secondary & tertiary institutions | - | - |

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| Action | Industry | Government | Corporate | International Agencies & Private Foundations |
|---|---|---|---------------------------|---|
| Introduce out-of-school music programmes and apprenticeship programmes | Industry to collaborate and support the programmes | JCDC and SDC to lead, using islandwide network of offices | Provide financial support | Provide financial support |
| Establish a Performing Arts High School | Industry to supply professionals to teach and support the programme | MOEYC to conduct feasibility study and develop a proposal | - | Provide technical assistance |
| Strengthen & expand programmes at Teacher's Colleges & Edna Manley College | Industry to articulate needs | MOEYC and Ministry of Finance to identify resources to upgrade the programmes | - | Provide technical assistance and financial support |

Conclusion & Final Recommendations

It is clear from the consultations that informed this National Strategy and Action Plan, that decisive and immediate action is necessary on the part of all the parties involved - government, private sector, industry and the media - to realize growth in the music industry and to take advantage of the many opportunities for international marketing and global branding which are evident. The recent international campaigns and merchandising successes of international brands like Puma, Christian Dior, and Mattel⁶ through their use of Jamaican images, icons and music, and the way in which the world was captivated by the concept of the Reggae Boyz in World Cup 1998, demonstrates the incredible potential that calls for immediate attention, strategic planning and resource allocation.

Each party involved has a unique perspective and issues that need to be resolved through dialogue and partnerships. All the parties expressed a willingness to work together and it is evident that this could be achieved if the collaborations were led and coordinated by a central body. A series of meetings between the main parties would have to be held to discuss ways of implementing the recommendations that have come out of the many studies and consultations over the past decade, that have been reflected in this Strategy Document. The precise mechanisms for implementation were not specified in this document as those have to be agreed on by the various parties involved, based on resources and priorities.

It is also evident that all the activities proposed in Tables 1 - 7 cannot be implemented all at once given limited resources, and as such the top 7 priority actions recommended by the participants in the consultation process that are expected to serve as catalysts for the development of the sector are as follows:

1. The government should establish a dedicated organization with an overseas marketing office, with significant resources to support the music and entertainment industries. This will ensure that there are human and financial resources available to address many of the issues, obstacles and needs raised in this National Strategy.
2. Until such a body can be established, the Inter-Agency Cultural Committee should make presentations and convene a series of training & sensitization workshops for persons in the public and private spheres of activity that impact on the industry. These include the Statistical Institute of Jamaica, the Planning Institute of Jamaica, and the development banks; other public sector officials in trade, tourism, sports, customs, information technology and the legislative arm of government; and selected private sector leaders.
3. A capacity building programme proposal should be developed and funding sought to assist industry associations, collecting societies and the data collection arm of the

⁶ Puma currently has an international campaign using Jamaican artists, and countryside and “granny” images and a line of athletic shoes in the colours of the Jamaican flag (black, green and gold); Christian Dior has a Rasta Collection line in red, green and gold, beginning at US\$300.00 per item; Mattel has a “Jammin’ in Jamaica” doll complete with reggae CD.

government. The proposal should be developed by the Entertainment Unit, in collaboration with industry stakeholders, the Division of Culture, JAMPRO, JIPO, STATIN and PIOJ.

4. Educational and cultural institutions should meet and develop a detailed plan of action to review and revise music education programmes at the primary, secondary and tertiary levels, and to advocate for more rigorous implementation of existing music education programmes.
5. The Entertainment Unit should convene a series of meetings with the government's financial and planning institutions (Ministry of Finance, National Investment Bank of Jamaica, Development Bank of Jamaica and the Planning Institute of Jamaica) and with interested private financial institutions such as Pan Caribbean Financial Services, to develop a public-private financial mechanism to assist the industry.
6. The Entertainment Unit, the Division of Culture and JAMPRO should collaborate to ensure that the passage of the Entertainment Encouragement Act is given priority attention by the Government and to address other issues related to legislation and enforcement including piracy, e-commerce, access to appropriate technology and content quotas.
7. The Entertainment Unit in collaboration with the Ministry of Finance and the PIOJ should seek funding for a major venue development programme, to be designed and implemented with input from stakeholders.

Appendix 1

Documents Reviewed

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Appendix 2

List of Participants in the Consultations

| | |
|-------------------|---|
| Kam-Au Amen | Coordinator, Entertainment Diploma, HEART/VTDI |
| Trefina Asiedu | Reggae Times |
| Marcia Ashley | Lecturer, School of Music, Edna Manley College of the Visual & Performing Arts |
| Lyndel Bailey | Music educator |
| Bernadette Barrow | National Commercial Bank |
| Ras Astor Black | Manager, Reggae Music Expo |
| Pamela Blake | Statistical Institute of Jamaica |
| David Brown | Director, African Caribbean Institute of Jamaica |
| Cleveland Browne | President, Recording Industry Association of Jamaica |
| Dwain Campbell | C-Sharp Entertainment |
| Micheal Cooper | Musician/ Lecturer, School of Music, Edna Manley College of the Visual & Performing Arts |
| Carol Coy | Statistical Institute of Jamaica |
| Vivian Crawford | Executive Director, Institute of Jamaica |
| Oscar Dewar | The Planning Institute of Jamaica |
| Harold Davis | Jamaica Business Development Centre |
| Fae Ellington | Chairperson, Entertainment Advisory Board |
| Jamliia Ellis | Representative, Sound Systems Association of Jamaica |
| Nicole Foga | Partner, Foga, Daley & Company |
| Linda Fong-Wright | Private Sector Organization of Jamaica |
| Steve Golding | Manager, Jamaica Association of Composers, Authors & Publishers |
| Maurice Gordon | Musician/Teacher |
| Robert Gregory | Managing Director, HEART Trust/ National Training Agency |

List of Participants in the Consultations cont'd

| | |
|------------------------|---|
| Shelia Graham | Consultant, Jamaica Cluster Competitiveness Project |
| Jennifer Grant | Director, Entertainment, Ministry of Industry and Tourism |
| Stephen Greig | RJR Communications Group |
| Jerome Hamilton | Managing Director, Headline Entertainment |
| Aeion Hoilett | Director, C-Sharp Entertainment |
| June Hoilett | Manager, Kingston Drummers |
| Clinton Hutton | University of the West Indies |
| Donald Jackson | Pan Caribbean Merchant Bank |
| Samuel Lamount | Writer/ Producer, Lamount Films & Music |
| Carol Lawes | Consultant |
| Carmen McDonald | Development Bank of Jamaica Ltd. |
| Clyde McKenzie | Director, Shocking Vibes Productions |
| Marcette McLeggon | Bank of Nova Scotia |
| Desmond Moulton | Managing Director, Valu Muzik |
| Sonjah Stanley Niaah | University of the West Indies |
| Wayne Nunes | Reggae Times |
| Lorna Reid | Statistical Institute of Jamaica |
| Day-Dawn Simo | Statistical Institute of Jamaica |
| Lloyd Stanbury | Director, Caribbean Music Expo |
| Valerie Veira | Jamaica Business Development Centre |
| Loreen Walker | Executive Director, Jamaica Intellectual Property Office |
| Maureen Webster-Prince | Librarian, National Library of Jamaica |

Appendix 3

Initiatives of the Entertainment Cluster, JCCP

The “Where The Hits Are Made” Tour

From the redemption songs of Bob Marley to the dancehall rhythms of Sean Paul, Jamaica has long been a musical hub of the world. The “Where the Hits Are Made” offers music lovers from across the globe the unique experience of visiting the very places where this musical magic continues to take place today. As a partnership between local tour operators and studio owners, the tour will provide transportation to participants who will visit a mix of Kingston’s legendary and recently popular studios including Harry J’s, Studio 1, Anchor and Tuff Riddim. Music lovers will get access to witness studio and recording sessions, talk with famous engineers, producers and artists, as well as view reggae memorabilia.

The “Where the Hits Are Made” tour is set to be launched on August 25, 2004.

Jamaica Signature Beats

The goal of Jamaica Signature Beats is to unite the industry players to attract international bands to come record in Jamaica using our studios, producers, engineers, musicians and film crews. Primary research indicated a willingness on the part of international labels to outsource music recording and production to Jamaica⁷. In personal interviews, labels cited significant informational barriers with respect to Jamaican music industry that inhibited their ability to contract with local producers and studios, and many were not aware of the track record and range of talent resident in Jamaican producers. To address this challenge, the entertainment cluster developed Jamaica Signature Beats (JSB) - an exclusive network of Jamaica’s top studios, music and video producers and musicians that have come together in an attempt to make themselves and their services more accessible to international labels, producers and artists.

JSB presently has over 30 members and is positioning itself as a “one-stop shop” for music recording and production in Jamaica. In August 2004, it will launch its website, www.JamaicaSignatureBeats.com which will provide a detailed overview of JSB members and services. JSB will engage booking agents internationally that will function as a referral service for international labels and bands that seek to record in Jamaica.

⁷ The Cluster launched a survey to 80 international reggae labels in Dec 2003, results can be provided upon request.

